

# SUBJECT DATASHEET

**Investments** 

**BMEGT35M113** 

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# I. SUBJECT DESCRIPTION

# 1. SUBJECT DATA

## Subject name

Investments

ID (subject code) BMEGT35M113

## Type of subject

contact lessons

| Course types and lessons | Course | types | and | lessons |
|--------------------------|--------|-------|-----|---------|
|--------------------------|--------|-------|-----|---------|

|            |         | <del></del>       |
|------------|---------|-------------------|
| Type       | Lessons | assessment        |
| Lecture    | 2       | Mid-term<br>grade |
| Practice   | 0       | Number of         |
| Laboratory | 0       | <u>credits</u>    |
|            |         | 2                 |

## **Subject Coordinator**

Position Name Contact details

Póra András assistant lecturer pora.andras@gtk.bme.hu

## **Educational organisational unit for the subject**

Department of Finance

## **Subject website**

nincs

#### Language of the subject

Magyar és Angol - HU and ENG

## Curricular role of the subject, recommended number of terms

# **Direct prerequisites**

Strong None Weak None Parallel None Exclusion None

## **Validity of the Subject Description**

<u>1t</u> f

Type of

3

## 2. OBJECTIVES AND LEARNING OUTCOMES

#### **Objectives**

The course's main goal is to familiarize the students with the operating mechanisms of equity markets, stock exc-hanges, the main market institutions, indices, the basics of equity analysis and the main portfolio-management stra-tegies. During the semester the main emphasis will be on the fundamental analysis of equities. The course covers mainly the content of the modul VI. of the CFA (Chartered Financial Analyst) exam.

#### **Academic results**

#### Knowledge

- 1. The students are aware of
- 2. 1. the main concepts of equity markets,
- 3. 2. the context and most important theories of equity markets,
- 4. 3. the main methods of equity analysis,
- 5. 4. the main strategies of portfolio management,

#### Skills

- 1. The students are able to
- 2. 1. plan and organize independent learning,
- 3. 2. comprehend and use the professional literature of the topic,
- 4. 3. grasp the professional language in writing and speech,
- 5. 4. recognize and solve practical professional problems.

#### Attitude

- 1. The students
- 2. 1. are open to learn and adapt the methodology of equity investments,
- 3. 2. collaborate with their instructors and fellow students during the learning process,
- 4. 3. gain knowledge and information,
- 5. 4. are open to critical thinking.

#### Independence and responsibility

- 1. The students
- 2. 1. are open to accept reliable critical remarks,
- 3. 2. are able to solve practical professional problems independently.

#### **Teaching methodology**

Lectures and written communication, use of ICT tools and techniques.

#### **Materials supporting learning**

- Kötelező:
- 1. Az előadások prezentációinak anyaga, ami a félév során folyamatosan fog feltöltésre kerülni.
- Ajánlott:
- 2. Bodie Kane Marcus: Investments (10th edition), McGraw-Hill, 2014.
- 3. Brealey, R. Myers, C.S. Allen, F.: Principles of Corporate Finance, McGraw-Hill, 2008.
- Obligatory:
- 1. Slideshows of the lectures which will be uploaded continously during the semester.
- Recommended:
- 2. Bodie Kane Marcus: Investments (10th edition), McGraw-Hill, 2014.
- 3. Brealey, R. Myers, C.S. Allen, F.: Principles of Corporate Finance, McGraw-Hill, 2008.

# II. SUBJECT REQUIREMENTS

## TESTING AND ASSESSMENT OF LEARNING PERFORMANCE

#### **General Rules**

Assessment of the learning outcomes described under 2.2. is based on one written end-term test.

#### Performance assessment methods

A. Detailed description of assesments during the term: 1. Written end-term test: on the 13th week, 30 minutes, 100 points. The test consists of mostly calculations and some definitions.

## Percentage of performance assessments, conducted during the study period, within the rating

• Written end-term test on the 13th week: 100

## Percentage of exam elements within the rating

## Conditions for obtaining a signature, validity of the signature

-

#### **Issuing grades**

| Excellent    | 90    |
|--------------|-------|
| Very good    | 80-89 |
| Good         | 70-79 |
| Satisfactory | 60-69 |
| Pass         | 40-59 |
| Fail         | 0-39  |

#### **Retake and late completion**

1) The written test of the week 13th can be retaken ont he 14th week.

## Coursework required for the completion of the subject

Participation in contact lessons 28 Preparing for the exam 62 Sum 90

#### Approval and validity of subject requirements

Consulted with the Faculty Student Representative Committee, approved by the Vice Dean for Education, valid from: 04.03.2024.

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# III. COURSE CURRICULUM

## THEMATIC UNITS AND FURTHER DETAILS

#### Topics covered during the term

The course's main goal is to familiarize the students with the operating mechanisms of equity markets, stock exc-hanges, the main market institutions, indices, the basics of equity analysis and the main portfolio-management stra-tegies. During the semester the main emphasis will be on the fundamental analysis of equities. The course covers mainly the content of the modul VI. of the CFA (Chartered

Financial Analyst) exam.

- 1 Introduction to the course
- 2 Structures and functions of financial institutions, macrofinances, financial markets
- 3 Equity Markets: Characteristics, Institutions and Benchmarks, Types and characteristics of Equity Securities.
- 4 Equity Market Investments and Risks, Market Valuation and Return Analysis, CAPM etc.
- 5 Behavioral Finance and Technical Analysis
- 6 Fundamental Analysis (Macro, Industry) I.
- 7 Fundamental Analysis (Company) II.
- 8 Fundamental Analysis (Company) III.
- 9 Equity Portfolio Management Strategies and Performance Analysis
- 10 Bonds, FX markets, forwards, futures, swaps, options etc.
- 11 Stock market crises
- 12 Practice of the Calculations, Consultation
- 13 End-term test
- 14 End-term test: RETAKE (Supplementary Test)
- 15 Buffer Week

#### **Additional lecturers**

Approval and validity of subject requirements

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